Office of Financial Management
BASS User Meeting
Activity Budgeting
August 28, 2003
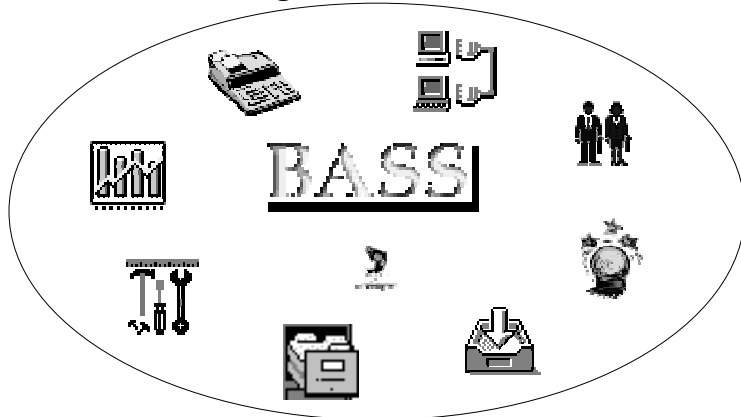
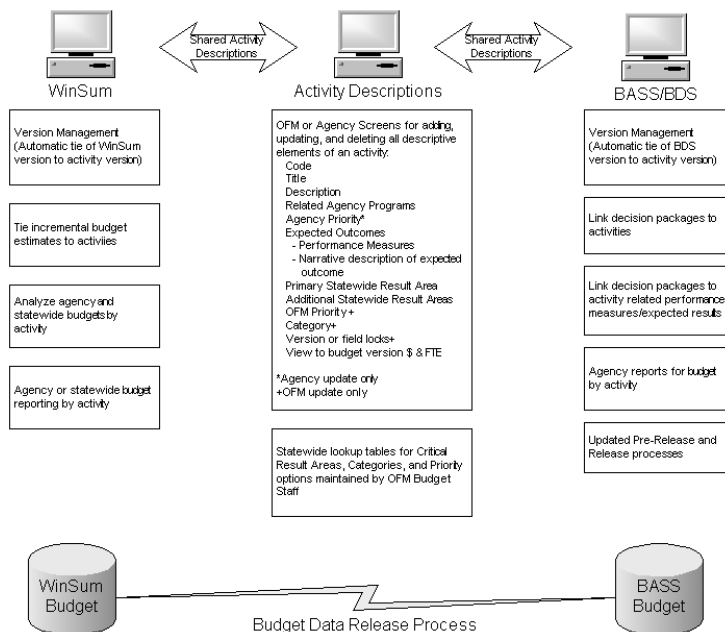# New Tools and Orientation Needed for Activity Budgeting

- Need a more automated way to update activity inventory information to make it timely and useful in the decision process.
- Need tools to develop the budget by activity and by increment in the same database and eliminate the need for reconciliation.
- Need to view and analyze the budget by activity and by increment.
- Need to modify the framework for performance measure reporting from an agency goal framework to an activity framework.
  - Also streamline performance measure activity if possible.
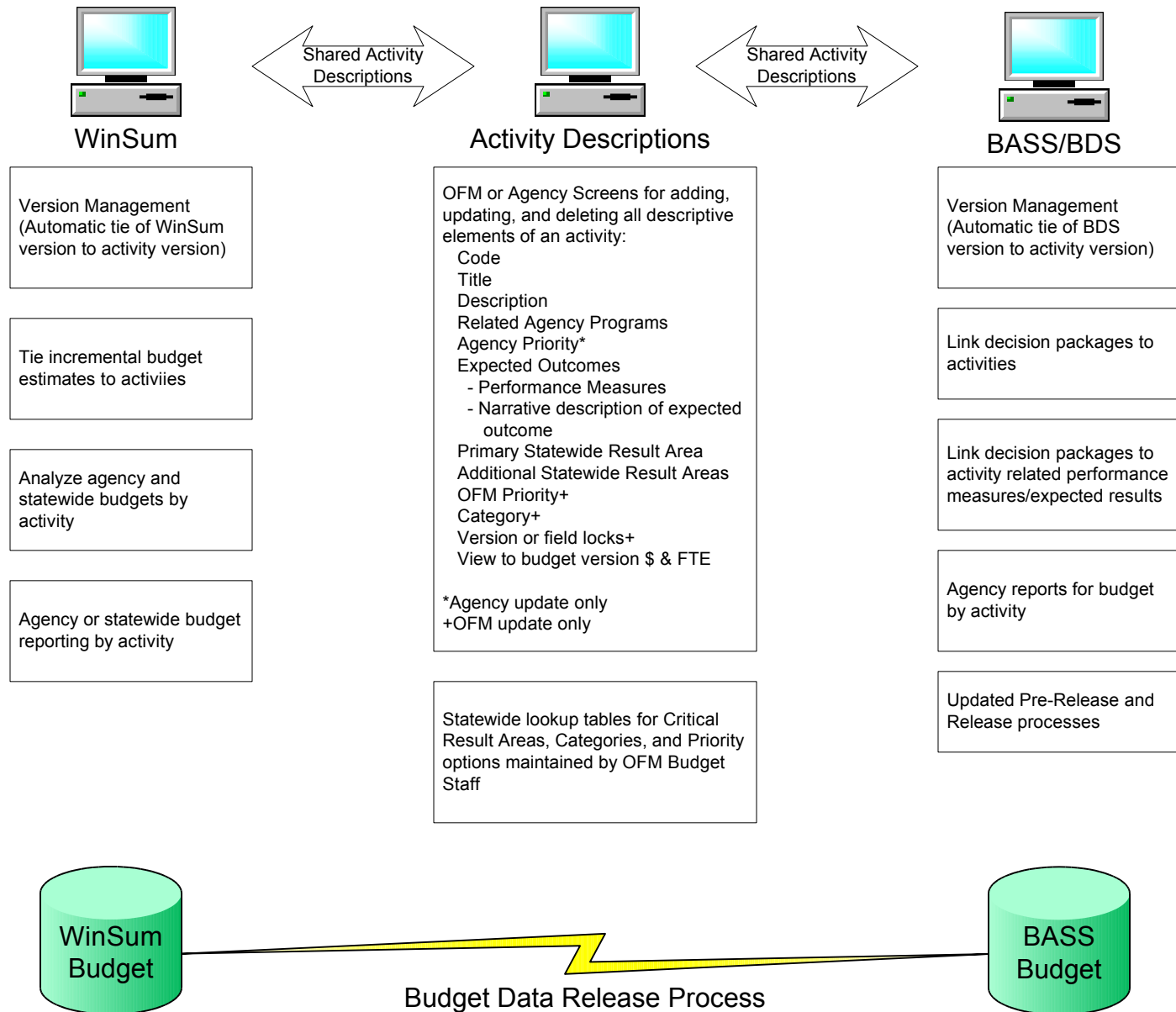
Scope of the Project

- On-line entry and editing of Activity information
- On-line reporting for Activity
- Electronic submittal of Activity information to the OFM budget division
- Facilitate more accurate data entry by editing against control totals
- Ability to identify decision packages by activity as well as by budget level and increment
- Ability to view budget versions by activity or by increment. (Also to view budget levels within versions by activity or increment)
- Streamline and reorient performance measures to support activity budgeting.
- Tools for statewide analysis and budget development
- Data submittal to the legislature

Conceptual Solution

Conceptual Solution
User Discussion

WinSum ⟷ Shared Activity Descriptions ⟷ **Activity Descriptions** ⟷ Shared Activity Descriptions ⟷ **BASS/BDS**

WinSum

Version Management (Automatic tie of WinSum version to activity version)

Tie incremental budget estimates to activiies

Analyze agency and statewide budgets by activity

Agency or statewide budget reporting by activity

Activity Descriptions

OFM or Agency Screens for adding, updating, and deleting all descriptive elements of an activity:
   Code
   Title
   Description
   Related Agency Programs
   Agency Priority*
   Expected Outcomes
    - Performance Measures
    - Narrative description of expected
      outcome
   Primary Statewide Result Area
   Additional Statewide Result Areas
   OFM Priority+
   Category+
   Version or field locks+
   View to budget version $ & FTE

*Agency update only
+OFM update only

Statewide lookup tables for Critical Result Areas, Categories, and Priority options maintained by OFM Budget Staff

BASS/BDS

Version Management (Automatic tie of BDS version to activity version)

Link decision packages to activities

Link decision packages to activity related performance measures/expected results

Agency reports for budget by activity

Updated Pre-Release and Release processes

WinSum Budget ⟶ Budget Data Release Process ⟶ **BASS Budget**

PMTES
PMRAPS
1997-2005
RIP

On lifesupport through June 2005 for tracking 2003-05 budget measures

Overriding Business Principles

- OFM Budget Analyst may update all elements of the Activity Description with the exception of Agency Priority.

- OFM budget staff may lock activity versions and/or fields for specific records within a version to disallow agency staff from making edits.

- OFM Budget Analyst only has access to OFM activity versions. Versions "released" by agency budget staff will get copied to an OFM version.

- Agency budget staff only have access to their agency's BASS activity versions. Versions created in BASS will be created with data copied from an OFM version.

- Agency budget staff may update activity descriptive information in any agency version that is not locked by OFM.

Overriding Business Principles (con't)

- Agency budget staff may update unlocked fields of any record of descriptive information for any version that is not locked by OFM except Category and OFM priority.

- Activity dollars and FTEs will be rolled up from the corresponding version of the respective system (WinSum or BDS).

- Activity $ by account and FTEs must balance to OFM-designated control totals for enacted budget versions.

- OFM budget staff do not have access to the BASS-BDS system or unreleased BASS budget data. Data is released to OFM systems for their use in WinSum.

- BASS users do not have access to the WinSum system or unreleased Winsum budget data. Some budget data is made available for validation purposes in BDS (pre-release edit checks).

Activity Description

BDS Decision Package Estimates

Affected Programs Tab Change

Affected Programs/Activities

Available Programs
```
Agency Level
010 - Administration
020 - Program Services
030 - Information Servic
040 - Accounting & Adm
```

Available Activities
```
10 - Statewide Accounting
20 - Collective Bargaining
30 - Population Es
40 - Service Ec
50 - A Service and
Accounting Services f
70 - Systems Development
```

Affected Program/Activity

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<<

Mock Screen

OFFICE OF FINANCIAL MANAGEMENT   8

Key Changes Envisioned in this Conceptual Design

- Agencies will make activity description changes directly into a system rather than into a Word or Excel template.
- Current biennium and carry-forward level data will be built by activity and account.
- Each decision package and increment must be assigned to affected activities.
- BDS/Activity Description would be used to develop performance measure information needed for the budget rather than PMTES.
  - Performance measures reported to OFM and published with the budget would be part of activity descriptions.
  - Measures would not be linked in the system to agency goals.
  - No measure type distinctions or active/inactive distinction.
  - At some point PMTES would no longer be maintained

OFFICE OF FINANCIAL MANAGEMENT   9

Project Schedule Targets

- By March 2004 – Features in place to give OFM ability to enter increments by activity to assist with developing Carryforward Level

- By March 2004 – Features in place to give agencies the ability to enter incremental estimates (decision packages) by activity

- By June 2004 – Features in place to allow OFM to analyze agency and statewide budget by activity as well as increment

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Feedback Appreciated

- Please let us know you thoughts on Activity Budgeting and proposed system changes.

- Send post-meeting comments to:

Lynne McGuire

Senior Budget Assistant

Budget Operations

Lynne.mcguire@ofm.wa.gov

360 902-0581

Vicki Rummig

BASS Product Manager

Statewide Financial Systems

Vicki.rummig@ofm.wa.gov

360 725-5268

Vision and Scope Document

for

BASS for Activity Inventory

Version 1.7 draft

Prepared by Vicki Rummig

OFM – BASS Team

August 24, 2003

Table of Contents

Revision History

Name	Date	Reason For Changes	Ver./Rev.
Vicki	5/22/03	Risk update per 5/22 meeting	1.1
Vicki	5/30/03	Incorporate Lynne's recommended changes and 5/28/03 meeting comments	1.2
Vicki	8/6/03	Review after requirement, use cases, and conceptual solution discussions	1.3
Vicki	8/12/03	Comments from Sharon pre 8/13/03 meeting	1.4
Vicki	8/14/03	Comments from 8/13 meeting	1.5
Sharon	8/18/03	Updates to sections 1.5, 1.6, 2.2, 3.1, 3.2, 3.3, 4.2	1.6
Lynne	8/19/03	Updates to sections: 1, 1.1, 1.4, 1.5, 2.2, 3.3, 4.1. Technical corrections, changes to make similar sections in V&S and SRS documents have the same language. Changed "Strategy" to "Category."	1.6b
Vicki	8/24/03	Updates per 8/21/03 meeting	1.7

1. Business Requirements

<The business requirements provide the foundation and reference for all detailed requirements development. You may gather business requirements from the customer or development organization's senior management, an executive sponsor, a project visionary, the marketing department, or other individuals who have a clear sense of why the project is being undertaken and the ultimate value it will provide, both to the business and to customers.>

OFM would like to be able to collect and work budget data by budget level (carry-forward, maintenance, performance), activity (a new requirement), and increment type (traditional RecSum code).   If BDS and Winsum data structures and systems could be updated to support collection, management and reporting of activity data—both as part of and separate from budget development--OFM would no longer require a separate activity inventory system.

High-level business requirements include:
*   Allow for agency and OFM entry and updates of all activity description elements, including performance measures, through, or in connection with, BDS and Winsum
*   Allow for collection, management, and reporting of activity data as part of building budget proposals in both BDS and Winsum
*   Support activity inventory reporting needs
*   Support needs for budget management and reporting by both increment and activity

See Appendix A for the detailed customer requirements.

Background
<This section summarizes the rationale for the new product. Provide a general description of the history or situation that leads to the recognition that this product should be built.>

BASS Background

The Budget and Allotment Support Systems (BASS) have provided web-based access for state agency budget development since 1997. The first BASS system implemented was the Performance Measure Tracking and Estimating System (PMTES). In addition to some minor utilities, BASS has implemented the following budget systems for state agency use:
*   Version Reporting System (VRS)
*   Budget Development System (BDS)
*   Capital Budgeting System (CBS)
*   Salary Projection System (SPS) – scheduled for release Fall of 2003

Winsum Suite of Systems Background

The OFM Budget Development System (Winsum) is a client-server application used by OFM Budget Division to develop and/or analyze the Governor's and Legislature's operating expenditure budget recommendations. It receives its data from state agencies via BDS through a SQL server. It also receives and sends data to the Legislature through LEAP via a SQL database accessible by both OFM and LEAP. The system produces recommendation summary data which is printed in the Governor's budget document.

Activity Inventory Background

Currently, the accounting structure for agency financial information is based on programs that usually align in some way to an agency's management structure. While this structure can

facilitate financial management and accountability within an organization, it does not necessarily offer good information about what state government does, what it costs to do it, and what outcomes are expected. This is what the activity inventory has tried to do.

The "Agency Activity Inventory" describes the major activities of each agency. Traditionally the inventory has provided for each activity:

- A brief description of the purpose of the activity
- The expected results of the activity (as a performance measure or outcome description)
- The agency program(s) associated with the activity
- The biennial budget for the activity by account (OFM now also wants by fiscal year)
- The number of annual FTEs attributed to that activity
- The OFM statewide category label that best describes the nature and purpose of the agency activity.   (OFM now would like to replace the statewide category label with "Statewide Result" (primary and other) and add a data element "Category" which groups similar purpose activities within a Statewide Result.)

The sum of the agency's activity dollars and FTEs must tie to the totals defined by OFM, for example, the totals of an enacted budget or a budget proposal.

Originally the Activity Inventory served as a means of recasting the program-structured budget into activities. An Access database was used to collect the data elements for each activity and to produce a report that was printed and posted to the OFM website. In 2002, OFM decided to use the activity inventory to inform budget development. The database was moved to a Visual Basic/SQL database and new fields were added to support the need to view the data in different ways.

The current system has some shortcomings for this kind of work.

- There is no easy way for agencies to either work in the system or to submit data electronically into the system. In the past agencies were asked to mark up a hard copy of the activity descriptions posted out on the web. In 2002, when OFM asked agencies to make major changes, OFM sent agencies activity data in Word templates. OFM staff re-keyed or copied the resubmitted data into the database.

- Usually OFM wants agencies to ensure that the total costs of the activities match a certain target. Agencies do not have an automatic way to confirm that they have done so.

2003-05 Budget Development Brought New Needs for Activity Information

Activity information was used heavily in the 2003-05 budget development process. The Priorities of Government approach used a state-enterprise rather than agency focus to budget development. Eleven statewide result areas were identified. OFM assigned all the activities to one or more results areas and asked teams to prioritize those activities according to their contribution to the result.

This analysis proved very helpful in developing the Governor's budget and in communicating the choices. OFM decided in November to use the activity framework to present much of the information in the Governor's budget documents. To do this OFM used the RecSum coding feature in Winsum to designate activities rather than the traditional increment type.

While OFM gained much by this approach, we also lost some of the benefit of the traditional RecSum view of the budget. Because agencies had used the traditional approach in building their budget, they could not easily compare their proposed budget with the Governor's budget. While many in the Legislature have appreciated the communication aspects of the activity view of the budget, they have also found it much more difficult to use than the increment view during their decision-making process. OFM also encountered challenges in applying cross-agency increments down to activity levels; OFM had to list those increments separately in the activity view of the budget, which detracted from its power.

The statewide result and activity orientation to the budget brought to light a need to modify the framework for performance measure reporting from an agency goal framework to an activity framework. These business developments point to a need for a system solution to facilitate the maintenance of activity descriptive information and do support activity based budget development.

1.1. Business Opportunity

<Describe the market opportunity that exists or the business problem that is being solved. Describe the market in which a commercial product will be competing or the environment in which an information system will be used. This may include a brief comparative evaluation of existing products and potential solutions, indicating why the proposed product is attractive. Identify the problems that cannot currently be solved without the product, and how the product fits in with market trends or corporate strategic directions.>

With the recent change in budget development policy to focus more on activity-based decisions, the need exists to provide better tools to facilitate these decisions. BDS and Winsum data structures and systems need to be updated to support collection, management and reporting of activity data—both as part of and separate from budget development. This would facilitate budget decisions as needed and would no longer require us to maintain a separate activity inventory system.

BASS and Winsum improvements typically occur incrementally based on the budget development cycle. The opportunity exists to enhance these applications in time for the 2005-07 budget development cycle which begins in the Spring of 2004.

1.2. Business Objectives

<Describe the important business benefits the product will provide, preferably in a way that is quantitative and measurable. The value provided to customers is described in section 1.4, so this section should focus on the value provided to the business. You might summarize the essence of the business case here, such as estimates of revenue or cost savings, return on investment analysis, target release dates, and a preliminary estimate of resources required to complete the project.>

In time for the 2005-07 budget development process (by March 2004 for OFM Carryforward development by activity, By March 2004 for agency customers; by June 2004 for OFM customers for review and analysis of activity based budgets) the project team will implement a tool which:
- Automates the development and updating of activity inventory information
- Enables agencies and OFM to develop, manage, and report the budget by both increments and activities

- Eliminates the reconciliation previously required to produce increment and activity views of the budget.

* Requirements for both agency and OFM systems must be developed simultaneously with a shared completion date of July 31, 2003. Holistic designs for both agency and OFM system must be completed by **October 31, 2003.**

1.3. Customer or Market Requirements

<Describe the needs of typical customers, including needs that are not yet met by the marketplace or by existing systems. You may wish to describe problems customers currently encounter that the new product will (or will not) address and how the product would be used by customers. Identify the customer hardware and software environment in which the product must operate. Define at a high level any known critical interface or performance requirements. Avoid including any design or implementation details. Present the requirements in a numbered list so that more detailed user or functional requirements can be traced to them.>

See Appendix A for the detailed customer requirements.

1.4. Value Provided to Customers

<Describe the value the customers will receive from this product and indicate how the product would lead to improved customer satisfaction. Express this customer value in terms such as:

- Recording and editing of Activity Inventory item elements through a graphical user interface
- Preparation of agency and governor budget request by activity through a graphical user interface
- Electronic submittal of Activity Inventory elements to OFM
- Electronic validation of Activity Inventory totals to control totals
- Improved budget and activity inventory reporting
- Improved budget communication and analysis options
- Improved productivity and reduced rework
- Cost savings
- Streamlined business processes
- Automation of previously manual tasks
- Conformance to current budget standards and regulations
- Improved usability / reduced frustration level compared to current processes and applications

1.5. Business Risks

<Summarize the major business risks associated with developing this product, such as marketplace competition, timing issues, user acceptance, implementation issues, or possible negative impacts on the business. Estimate the severity of the risks and identify any risk mitigation actions that could be taken.>

Risk	Severity	Assigned	Mitigation

1. Policy regarding use of Activity Inventory and Activity Budgeting for the 2005-07 Budget Development not yet fully defined.	6	Lynne	• Try to define major policy elements by September 15, 2003 • Keep BASS product managers in the loop of any potential changes to policy.
2. Insufficient time to develop required features	8	Sharon / Dan	• Careful review of system requirements for prioritization (*only truly mandatory are marked mandatory*) • Frequent analysis of project process/status • Frequent communication of changes in project schedule for Planning Team consideration • Identify and secure project team resources early
3. Budget Analysts in OFM and agencies may have limited availability for helping to define Use Cases, report requirements and testing.	6	Lynne / Vicki	• Agency meeting August 28, 2003. • Budget Analyst meetings in July and August 27, 2003 • Early schedule planning for resources • Keep mindful of business cycles • Meetings with customers early and often; requirements review, conceptual solution review, prototype (non-working) review, etc.
4. Activity budgeting business processes and end product system increasing workload to OFM and agency budget staff	6	Lynne / Vicki	• Communicate policy changes to those potentially affected as early as possible • Meetings with customers early and often; requirements review, conceptual solution review, prototype (non-working) review, etc.
5. Ability to convert data from OFM Activity Inventory system to new	3	Erik / David H. / Lynne	• Early analysis, planning, and design • Budget operations involvement in data conversion
6. Not yet known whether and how the legislature would like to participate in the project or other legislative interest in proposed process changes	3	Lynne	• Keep in contact with LEAP and legislative fiscal staff.
7. Development staff not co-located.	6	Sharon / Dan	• All staff participate in daily status meetings. • All staff participate in weekly Wednesday afternoon design team meetings.

8. Developers new to the applications and business process	6	Sharon	• Activity Budgeting review (8/14-8/15) • Set realistic scope and track status frequently
9. How do we ensure that the required resources can be directed and are accountable?	6	Sharon	• Document resource relationships, create an accountability matrix. Review expectations with resources and resource managers. Ensure all resources are directed and accountable to a single project manager.
10. OFM needs to define technical support roles for ongoing support.	6	Sharon / Dan	• Determine who will provide ongoing technical support for each component of Activity Budgeting.
11. WinSum code will be frozen for activity budgeting. Will not be able to make emergency WinSum changes for supplemental or other.	3	Lynne / Lori / Dan	• Only truly critical WinSum changes will be considered during development for Activity budgeting • Develop a mitigation plan in case of the need for a critical coding change to WinSum

2. Vision of the Solution

<This section establishes a long-term vision for the system to be built to address the business objectives. This vision will provide the context for making decisions throughout the course of the product development life cycle. The vision should not include detailed functional requirements or project planning information.>

2.1. Vision Statement

<Write a concise vision statement that summarizes the purpose and intent of the new product and describes what the world will be like when it includes the product. The vision statement should reflect a balanced view that will satisfy the needs of diverse customers as well as those of the developing organization. It may be somewhat idealistic, but it should be grounded in the realities of existing or anticipated customer markets, enterprise architectures, organizational strategic directions, and cost and resource limitations.>

The state agencies and OFM have tools to facilitate the development and use of the inventory of state activities. Activity data is easy to develop, edit, update and publish. Budget proposals will be built with decision packages that reference the budget level, the increment purpose and the affected activities. These building blocks will allow budget analysts to view, analyze and develop the budget by increment as well as activity with ease, and without time-consuming and difficult to replicate reconciliations. The Governor, the legislatures and the agencies will be able to be able to communicate with the public effectively, and with confidence, about what a budget proposal buys and does not buy as well as how the budget proposal differs from the current budget.

2.2. Major Features

<Include a numbered list of the major features of the new product, emphasizing those features that distinguish it from previous or competing products. Specific user requirements and functional requirements may be traced back to these features.>

- On-line entry and editing of Activity information

- On-line reporting for Activity

- Electronic submittal of Activity information to the OFM budget division

- Facilitate more accurate data entry by editing against control totals

- Ability to identify decision packages by activity as well as by budget level and increment

- Ability to view budget versions by activity or by increment. (Also to view budget levels within versions by activity or increment)

- Streamline and reorient performance measures to support activity budgeting.

- Tools for statewide analysis and budget development

- Data submittal to the legislature

2.3. Assumptions and Dependencies

<Record any assumptions that were made when conceiving the project and writing this vision and scope document. Note any major dependencies the project must rely upon for success, such as specific technologies, third-party vendors, development partners, or other business relationships.>

- Agency user components will be developed in BASS by the BASS team.
- Budget data from the BASS system will be submitted to the OFM WinSum system via a SQL stored procedure.
- OFM IS Division staff will make required changes to WinSum so that data can be loaded from BASS.
- Activity descriptive information will be in one central database, shared by BASS and OFM budget systems.

3. Scope and Limitations

<The project scope defines the concept and range of the proposed solution. It's also important to define what will not be included in the product. Clarifying the scope and limitations helps to establish realistic expectations of the many stakeholders. It also provides a reference frame against which proposed features and requirements changes can be evaluated. Proposed requirements that are out of scope for the envisioned product must be rejected, unless they are so beneficial that the scope should be enlarged to accommodate them (with accompanying changes in budget, schedule, and/or resources).>

3.1. Scope of Initial Release

<Describe the intended major features that will be included in the initial release of the product. Consider the benefits the product is intended to bring to the various customer communities, and generally describe the product features and quality characteristics that will enable it to provide those benefits. Avoid the temptation to include every possible feature that any potential customer category might conceivably want some day. Focus on those features and product characteristics that will provide the most value, at the most acceptable development cost, to the broadest community.>

Based on requirements identified as Benefit 9 and Penalty 9 (mandatory) for the initial release:

- Develop a user interface and related database for entry and collection of activity descriptive information shared by agency and OFM staff.
- Make required changes to BDS to facilitate agency entry of incremental budget changes by activity.
- Make required changes to Winsum to facilitate OFM entry of incremental budget changes by activity.
- Make required changes to BDS and Winsum to allow view, edit and analysis of agency budget proposals by activity.
- Develop system function that allows OFM to analyze statewide views of activity inventory information and budgets by activity.
- Make changes in BDS, PMTES, PMRAPS as necessary and/or develop capacity in the activity database to meet budget development related performance measurement business needs.
- Update BDS and WinSum version functions to coordinate versions for activity information
- Update data edit and release process to facilitate transfer of budget data by activity.
- Develop minimal reporting and data export needs to facilitate activity budgeting and activity inventory reporting.

The effort to establish the scope of the first release of Activity budget changes has begun and is ongoing. The initial requirements were prioritized with mandatory items identified. Additional functional requirements that are identified during the development of use cases and design work will also be prioritized, and detailed design work completed on the highest priority items. The features that will be included in the first, or core, release of Activity budget changes will be determined during the requirements definition phase of the project and may be further refined during the design and development phases.

3.2. Scope of Subsequent Releases

<If a staged evolution of the product is envisioned over time, indicate which major features will be deferred to later releases.>

The scope of subsequent releases of Activity Budgeting functionality will be driven by an evaluation of what changes and/or improvements are suggested by the customers following the initial release as well as the customer and functional requirements that were not included in the initial release. A prioritization and scope setting exercise similar to the first release will be used.

3.3. Limitations and Exclusions

<Identify any product features or characteristics that a stakeholder might anticipate, but which are not planned to be included in the new product.>
The customer requirements are listed in Appendix A. Those that are not marked with a 9 Benefit and 9 Penalty (mandatory) will probably not be addressed in the first release. This scope may be further refined as the project proceeds through the design and development phases.

4. Business Context

<This section summarizes some of the business issues around the project, including profiles of major customer categories, assumptions that went into the project concept, and the management priorities for the project.>

4.1. Customer Profiles

<The customer profiles identify the customers for this product and some of their essential characteristics. Characterize business-level customers, target market segments, and different user classes, to reduce the likelihood of unexpected requirements surfacing later that cannot be accommodated because of schedule or scope constraints. For each customer category, the profile includes the major benefits they will receive from the product, their likely attitudes toward the product, key features of interest, success drivers, and any known constraints that must be accommodated. Example:>

Customer Category	Major Benefits	Attitudes	Key Features	Success Drivers	Constraints
executives	*increased revenue*	*see product as avenue to 25% increase in market share*	*richer feature set than competitors*	*time to market*	*maximum budget = $1.4M*
editors	*fewer errors in work*	*highly receptive, but expect high usability*	*automatic error correction*	*ease of use, high reliability*	*must run on low-end workstations*
legal aides	*quick access to data*	*resistant unless product is keystroke-compatible with current system*	*ability to handle much larger database than current system*	*easy to learn, accurate data*	*no budget for retraining*

Customer Category	Major Benefits	Key Features	Success Drivers
OFM Budget	More information/ tools to support Governor's decision process Accurate data Minimize impact to workload	Edits, validation to budget control numbers Easy entry screens Multiple view options	Available for 2005-07 budget submittal. Improved data accuracy.
BASS users	Easier to update	Easy entry screens	Less time for entry, more accurate

| | Accurate data | | |
| | Minimize impact to workload | | |

4.2. Project Priorities

<Describe the priorities among the project's requirements, schedule, and budget. The table below may be helpful in identifying the parameters around the project's key drivers (top priority objectives), constraints to work within, and dimensions that can be balanced against each other to achieve the drivers within the known constraints. Examples:>

Dimension	Driver (state objective)	Constraint (state limits)	Degree of Freedom (state allowable range)
Schedule	Release 1.0 to be available by March 2004 for OFM Carryforward development by activity; March 2004 for BDS for recording of incremental budget changes (carryforward level for OFM, maintenance and performance level for agencies) and June 2005 for budget review and analysis of activity based budgets	Budget development begins	Delayed delivery could adversely affect budget development and impact on users.
Features	Features sufficient to meet all of the mandatory requirements	Limited resources, limited development time	100% of mandatory features must be included in release 1.0. Mandatory items may be reclassified in the event it is determined that there are not sufficient resources and time to accomplish all mandatory items for the first release. Highly desirable items are negotiable by project/planning team.
Quality	No critical bugs Data transferred to OFM budget systems without error	Limited resources, limited development time	100% of data critical (entry and transmittal) errors must be resolved. Other bugs are negotiable by project/planning team.
Staff	Coordinated staffing between BASS and OFM IS division to support all aspects of project development	BASS: 1 – Project Manager 50% 1 – Product Manager 50% 2 – Developers - 100%) 2 – Testers (80%) IS Division: 2 - Developers (1 50%, 1 100%) OFM Budget: 3 – Testers (variable)	Project team resources identified are critical to ensuring timely and quality delivery of product.

5. Project Success Factors

<Determine how success will be defined and measured on this project, and describe the factors that are likely to have the greatest impact on achieving that success. Include things within the direct control of the organization, as well as external factors. If possible, establish measurable criteria for assessing whether the business objectives have been met.>

- Agencies submit complete and correct Activity Inventory updates
- Budget versions can be displayed by activity or by increment from the system. Reconciling is not required.
- Customers have adequate time to attend and receive training on the new system.
- Adequate resources are available for the duration of the project.
- OFM Statewide Financial Systems, OFM Budget Division and OFM Information Services Division staff seize this opportunity to develop this system as a joint-venture.
- Design, development, and testing efforts operate within a single project management structure.
- The team implements a rigid change management process for requirement and design.
- A first release of the system is ready to use for the 2005-07 budget process.
- All user groups have ample opportunity to participate meaningfully in the project